1981 EDITION

BUS FACTS

Intercity Bus Industry
In 1980 and Decade
of 1970's

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1980 — A Summary

INDUSTRY AS A WHOLE	1980	1979
Passengers (millions)	373	359
Passenger Miles (millions)	27,700	27,200
Operating Companies	1,330	1,200
Employees	49,600	47,000
Buses in Use	21,900	20,680
Operating Revenue (millions)	$1,947	$1,655
Pre Tax Operating Income (millions)	$133.5	$90.2
Operating Margin	6.9	5.4

CLASS I CARRIERS	1980	1979
Passengers (millions)	134.2	133.0
Passenger Miles (millions)	17,300	17,300
Operating Companies	46	46
Employees	31,190	29,978
Buses Owned	8,400	8,330
Operating Revenue (millions)	$1,394	$1,205
Pre Tax Operating Income (millions)	$81.1	$58.2
Operating Margin	5.8	4.8

Foreword

The Intercity Bus Industry consists of approximately 1,330 bus companies that provide regular route operations and tour and charter services throughout the U.S.

Forty-six of these companies are categorized by the Interstate Commerce Commission as Class I carriers. (A Class I carrier has gross revenues of $3 million and provides interstate service). All other companies have revenues of less than $3 million or operate exclusively in intrastate service.

The Class I carriers provide the bulk of the nation's scheduled route service. Most smaller carriers are focused on tour and charter operations.

The American Bus Association is the national organization of the intercity bus industry. ABA membership consists of bus operating companies, organizations involved in tourism and travel, and organizations which sell services and products to the industry.

Bus company membership includes Greyhound Lines, Inc., the Trailways, Inc. system and over 600 other carriers. Collectively these carriers provide more than 90% of all intercity bus travel in the U.S. and Canada.

The Association is the recognized source for information on the industry and maintains a full time research staff. On a routine basis the staff provides data to government agencies, private consulting and research firms, educational institutions and the press as well as members of the Association.

Issuing the enclosed information under the title of "Bus Facts" revives a tradition of prior years. More recently this data has been published as part of the Association's formal annual report. With the increased demand for the annual report, particularly in areas which do not require in-depth statistical data, this information is once again being published separately to allows its distribution in a most timely and helpful manner.

The Role of Buses Relative to Other Common Carrier Intercity Passenger Transportation in the United States

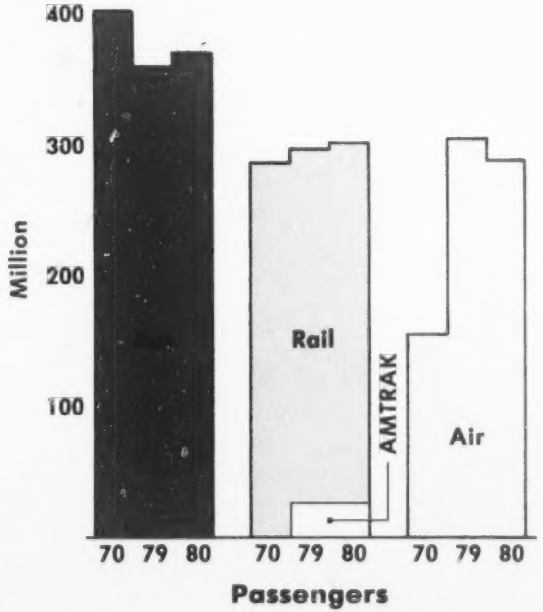
- Buses carried an estimated 373 million intercity passengers during 1980, one-fourth more than on either the railroads (even if the large numbers of commuter rail passengers are included) or on the airlines.
- Passenger miles traveled on intercity buses totaled 27.7 billion — 6 times the total for AMTRAK and nearly 2-½ times the total for the railroads, although only about 13 percent of the airline total. Air passengers typically travel much longer distances than do those on either railroads or bus lines. Automobiles dominate intercity passenger travel with about 1-¼ trillion passenger miles in 1980, as compared with some 245 billion for all common carriers (bus, air, and rail) combined.
- Intercity bus travel increased between 1979 and 1980, contrary to the general trend for public carriers. The number of bus passengers rose about 4 percent and passenger miles 2 percent while both airline and AMTRAK travel were down.
- Intercity buses, in 1980, served about 14,600 places in scheduled service listed in the *Official Bus Guide* and many more in service not listed in the *Guide*. Less than 1,000 of the points served by buses have service by airlines or railroads. Buses therefore provide by far the most ubiquitous form of common carrier intercity passenger transportation despite a decline of more than 2,000 places between 1968 and 1980 in numbers of places so served.

Intercity Travel Volume on Principal Common Carrier Modes

	Buses	Railroads	Airlines
	Passengers Carried (millions)		
1970	401	284[1]	156
1979	359	295[1] (21.5[a])	305
1980	373	300[1] (20.8[a])	285
	Passenger Miles Traveled (billions)		
1970	25.3	10.9[1]	109.0
1979	27.2	11.6[1] (4.9[a])	214.9
1980	27.7	11.4[1] (4.5[a])	205.6
	Communities Served		
1968	16,800	NA	NA
1980	14,600	560[2] (550[a])	650[3]

a. AMTRAK

For other footnotes and sources, see page 22.


400
300
200
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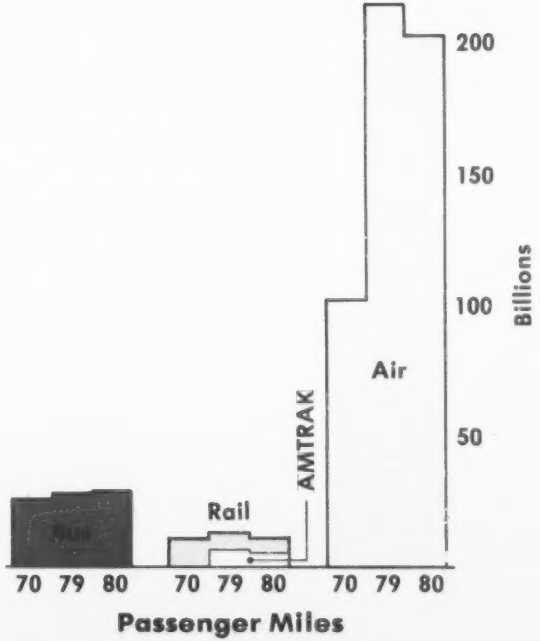
Million
Rail
AMTRAK
Air
70 79 80 70 79 80 70 79 80
Passengers


200
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Billions
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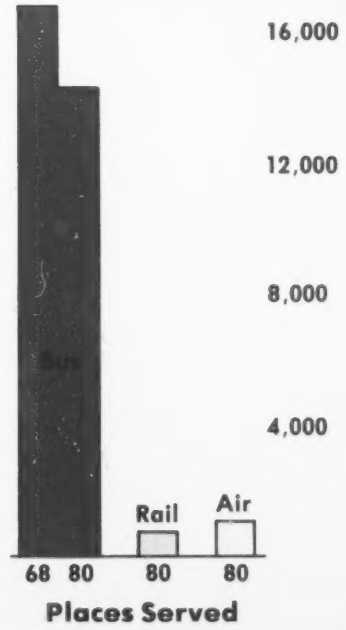
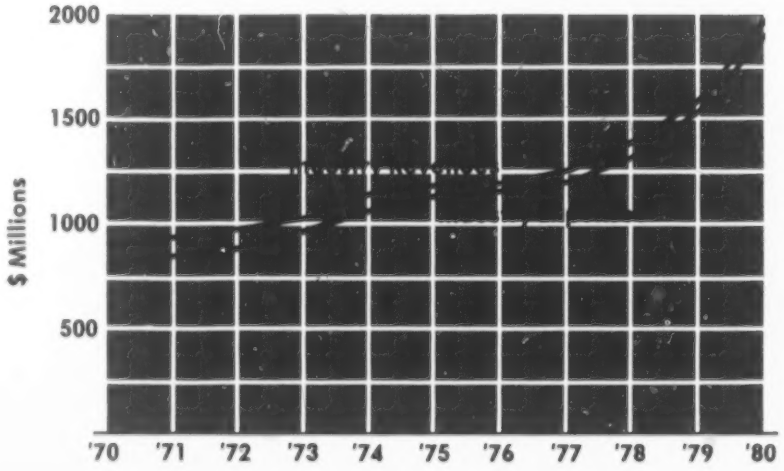
AMTRAK
Air
70 79 80 70 79 80 70 79 80
Passenger Miles


16,000
12,000
8,000
4,000
Rail
Air
68 80 80 80
Places Served

Overview of the U.S. Intercity Bus Industry

Some 1,330 companies constituted the intercity bus industry in 1980. These companies operated bus fleets totaling an estimated 21,900 vehicles, providing service over an estimated 280,000 route miles in scheduled service and, in charter and special tour services, anywhere on the nation's millions of miles of streets, roads, and highways. As already noted, they served some 14,600 communities in scheduled service, a total which includes, according to a recent ABA review of pertinent studies, service directly to, or to points within 5 miles of, about 87 percent of all communities in the country with a population of 2,500 to 10,000 persons.

The industry operated 1.2 billion bus miles during 1980, receiving gross operating revenues estimated at $1.95 billion and incurring operating expenses totaling some $1.81 billion. With net operating revenue of $134 million, the industry's operating ratio (expenses divided by revenues) stood at 93.1 — the lowest (and best) average since 1975 but well above the decade-earlier averages (90.1 in 1970 and 89.4 in 1971).



INTERCITY BUS INDUSTRY IN THE UNITED STATES
Including Operations of Class I, II, and III Carriers Reporting to the Interstate Commerce Commission and Intrastate Carriers

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980**
Number of Operating Companies	1,000	1,000	1,000	1,000	950	950	1,000	1,050	1,100	1,200	1,330
Number of Buses	22,000	21,900	21,400	20,800	21,000	20,500	20,100	20,300	20,250	20,680	21,900
Miles of Highway Served[1]	267,000	267,000	270,000	270,000	271,000	274,000	276,000	276,000	278,000	280,000	280,000
Number of Employees[2]	49,500	50,200	49,100	48,400	49,400	46,700	46,000	46,200	46,200	47,000	49,600
Total Bus Miles (millions)	1,209	1,202	1,182	1,178	1,195	1,126	1,118	1,118	1,099	1,135	1,182
Revenue Passengers (millions)	401	395	393	381	386	351	340	328	338	359	373
Revenue Passenger Miles (millions)	25,300	25,500	25,600	26,400	27,700	25,400	25,100	25,700	25,400	27,200	27,700
Operating Revenues, all services ($ millions)	901.4	953.2	974.4	1,022.7	1,151.9	1,171.6	1,231.9	1,330.9	1,420.3	1,654.8	1,946.5
Operating Expenses ($ millions)	812.2	851.8	882.1	937.9	1,070.0	1,103.2	1,179.9	1,276.2	1,366.3	1,564.6	1,813.0
Net Operating Revenue, before income taxes ($ millions)	89.2	101.4	92.3	84.8	81.9	68.4	52.0	54.7	54.0	90.2	133.5
Operating Ratio[3]	90.1	89.4	90.5	91.7	92.9	94.2	95.8	95.9	96.2	94.6	93.1
Taxes Assignable to Operations ($ millions)[4]	76.7	80.7	84.1	89.6	94.8	96.5	100.6	103.0	101.5	101.2	112.6

For footnotes and source, see pages 22 and 23.

In providing such services, the industry employed an estimated 49,600 persons in 1980, exclusive of such persons as the numerous commission agents, and their employees, who sell bus tickets and provide station services to bus passengers in smaller communities throughout the country — receiving compensation in the form of commissions on sales of bus tickets and package express transportation.

Intercity bus operations in the United States includes several segments which differ with respect to operating and financial characteristics and availablity of descriptive information. All carriers providing interstate service are required to obtain operting authority from the Interstate Commerce Commission.

The larger of such "interstate" carriers are termed "Class I"; they include, beginning January 1, 1977, only companies with gross annual operating revenues of at least $3 million ($1 million for years 1969 through 1976 and $200,000 for many years prior to 1969). The Class I carriers (46 in number) accounted in 1980 for some 62 percent of all passenger miles traveled during that year on all intercity bus services. Operations of many Class I companies are concentrated most heavily in regular-route passenger and package-express services; it is therefore not surprising that they account for about 90 percent of all passenger miles traveled in regularly scheduled intercity bus service.

Carriers other than Class I include the smaller companies reporting to the Interstate Commerce Commission (formerly termed "Class II and III" companies) and carriers which provide only intrastate service (operating physically within a single state participating in no interchange service with carriers which do operate interstate). These carrier groups cater typically to passengers on short trips and to travelers in charter special service. They account for only about 10 percent of all passenger miles traveled in regular-route service of all intercity buses but some 67 percent of the estimated travel total for charter and special service.

Comprehensive carrier data are available only for the Class I segment of the industry. Operating and financial statistics for bus operations as shown on pages 5 and 8 and subsequent pages to the end of this booklet relate therefore only to the Class I companies.

INTERCITY BUS INDUSTRY IN THE UNITED STATES
Class I Interstate Carriers

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
Number of Companies	71	71	74	75	81	85	81	46	46	46	46	46
Number of Buses Owned	10,158	9,900	9,711	9,300	9,885	10,030	10,000	8,580	8,360	8,143	8,330	8,400
Miles of Highway Served[1]	194,000	193,000	198,000	198,000	205,000	211,000	213,000	191,000	191,000	193,000	195,000	194,000
Number of Employees	34,383	34,731	34,147	33,829	35,621	35,140	33,740	31,030	29,700	29,194	29,978	31,190
Total Bus Miles (millions)	870.9	856.0	845.8	850.0	885.6	848.9	838.0	774.6	766.2	739.3	762.9	778.5
Revenue Passengers (millions)	174.0	166.8	164.0	154.8	168.7	152.2	145.9	127.7	125.1	124.8	133.0	134.2
Revenue Passenger Miles (millions)[2]	17,900	17,940	17,790	18,300	19,500	18,200	17,820	16,440	16,930	16,200	17,300	17,300
Operating Revenues, all services ($ millions)	721.7	758.4	775.3	814.6	932.6	954.7	997.0	932.4	982.7	1,036.7	1,205.2	1,393.9
Operating Expenses ($ millions)	639.0	664.4	689.6	738.0	858.7	893.2	952.1	890.5	937.7	998.3	1,147.0	1,312.8
Net Operating Revenue, before income taxes ($ millions)	82.7	94.0	85.7	76.6	73.9	61.5	44.9	41.9	45.0	38.4	58.2	81.1
Operating Ratio[3]	88.5	87.6	88.9	90.6	92.1	93.6	95.5	95.5	95.4	96.3	95.2	94.2
Taxes Assignable to Operations ($ millions)[4]	60.3	62.5	65.2	69.8	74.4	77.2	80.1	75.3	76.2	75.6	75.2	82.8
Net Value of Property Owned ($ millions)[5]	310.0	323.8	343.4	358.1	367.4	395.4	419.3	390.7	414.0	447.9	467.3	496.7

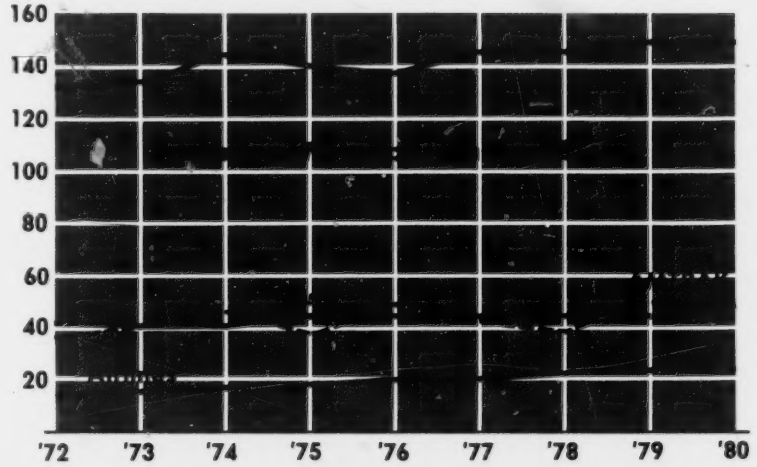
For footnotes and source, see pages 22 and 23.

Comparative Fuel Efficiency and Intensity
Buses and Other Intercity Passenger Modes

Intercity buses are several times as fuel efficient as any other mode of intercity passenger transport. Regularly scheduled bus service, for which average passenger loads tend to be comparatively light, achieved in 1980 an average of 112 passenger miles per gallon of diesel fuel, 2-½ times or more than the corresponding average for automobiles or AMTRAK and nearly 5 times the average for the airlines.

In charter and special service, fuel efficiency for buses is almost double that for regularly scheduled service due to typically much higher load factors. Such services averaged some 208 passenger miles per gallon of fuel in 1980, 4-½ times that for automobiles or AMTRAK.

Fuel cost and utilization factors for the Class I carriers are shown on page 18.



ENERGY EFFICIENCY AND INTENSITY
Domestic Intercity Modes

	1972	1973	1974	1975	1976	1977	1978	1979	1980
Passenger Miles per Gallon of Motor Fuel									
Intercity Buses									
All service[1]	132	133	145	140	137	143	143	146	143
Regular-route intercity service	111	115	121	115	110	114	115	115	112
Charter and special service	201	201	208	208	208	204	203	208	208
Amtrak	38[2]	39[2]	46[2]	39[2]	44[2]	41[2]	38[2]	47[2]	45[2]
Automobiles	40	39	40	41	41	41	42	42	NA
Airlines (certificated)	15	15	17	18	19	20	22	23	23
British Thermal Units per Passenger Mile									
Intercity Buses									
All service	1,051	1,043	957	991	1,012	970	970	950	970
Regular-route intercity service	1,250	1,206	1,019	1,206	1,261	1,217	1,206	1,206	1,238
Charter and special service	690	690	667	667	667	680	683	667	667
Amtrak	3,650	3,556	3,015	3,556	3,152	3,383	3,650	2,951	3,082
Automobiles	3,125	3,205	3,125	3,049	3,049	3,049	2,976	2,976	NA
Airlines (certificated)	9,000	9,000	7,941	7,500	7,105	6,750	6,136	5,870	5,870

For footnotes and source, see pages 22 and 23.

Income Statement

The Class I carriers grossed $1.39 billion in 1980 and incurred operating expenses of $1.31 billion. Net operating revenue therefore totaled $81 million, representing 5.8 percent of gross revenues — a significant improvement over 1979 and immediately preceding years but well under the earlier years of the decade. With nearly $28 million in net nonoperating receipts (before consolidation of reports for affiliated carriers), net income before income taxes totaled $108.7 million. With provision for income taxes of $25.3 million, after-tax net totaled $83.4 million. After consolidation of reports of affiliated carriers to remove major duplications in nonoperating income, net income before taxes totaled $98.8 million and after-tax net $73.5 million. The consolidated figures include some $17.7 million in net nonoperating income.

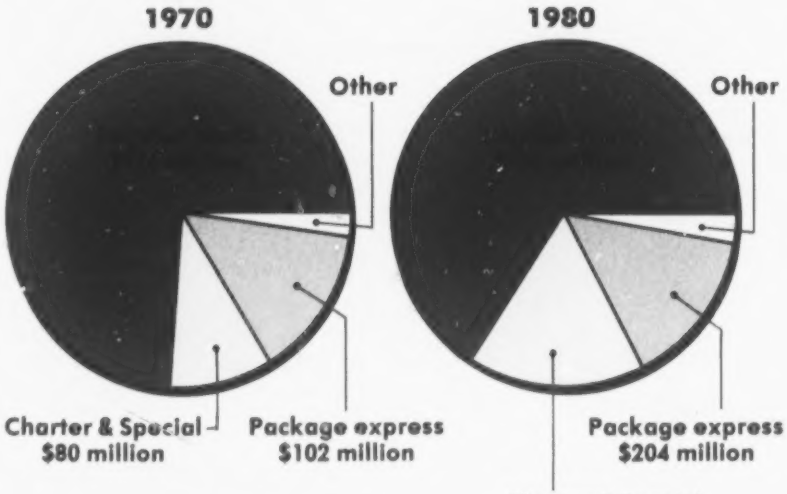
CONDENSED INCOME ACCOUNT
Class I Carriers
Totals in Millions of Dollars

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
Operating revenues	721.7	758.4	775.3	814.6	932.6	954.7	997.0	932.4	982.7	1,036.7	1,205.2	1,393.9
Operating expenses	639.0	664.4	689.6	738.0	858.7	893.2	952.1	890.5	937.7	998.3	1,147.0	1,312.8
Net operating revenue	82.7	94.0	85.7	76.6	73.9	61.5	44.9	41.9	45.0	38.4	58.2	81.1
Net income before income taxes	88.0	103.0	93.1	87.1	93.1	83.0	60.6	56.4	61.8	56.3	73.1	108.7
Net income[1]	52.1	64.5	59.0	57.9	55.9	55.8	43.7	40.4	44.2	40.3	57.1	83.4
Operating ratio[2]	88.5	87.6	88.9	90.6	92.1	93.6	95.5	95.5	95.4	96.3	95.2	94.2

For footnotes and source, see pages 22 and 23.

Revenues

Regular-route intercity passenger transportation service grossed $943.4 million in 1980, or 67.7 percent of total operating revenues of the Class I carriers — a proportion which was down from about 72.5 percent in 1970 for carriers continuing in the Class I category over the decade. Conversely, the proportion of revenues from charter and special service increased over the same years. Totaling $204 million in 1980, such revenues went from some 9.3 percent of total receipts in 1970 to 14.6 percent in 1980 (for companies not removed from the Class I category in 1977). During the years since 1978, there has been some reversal of such long-term comparative patterns for the principal passengers services. As shown in the table on page 12, revenue increases for the Class I carriers during these recent years derived most directly from regularly scheduled passenger services as the largest carriers placed principal emphasis on regular-route service, particularly during periods of automobile fuel shortage. However, the smaller (Class I and non-Class I) carriers have continued in most recent years to show comparatively large proportionate gains for revenue from charter and tour ser-



Sources of Revenues for Class I Intercity Bus Companies in 1970 and 1980

vices. As a result, such services have continued to expand the dominant role which they have come to play in operation of much of the intercity bus industry; revenue from such services rose from an estimated 63-⅓ percent in 1978 of gross receipts of carriers other than Class I to 64 percent in 1979 and 67-¾ percent in 1980.

Passenger revenue from intercity scheduled services of the Class I carriers in 1980 averaged 7.3 cents per passenger mile of travel. This average was approximately double the correspondng average a decade earlier (about 3.6 cents), but rapid increases in expenses narrowed substantially the margin of profit in the average ticket yield. With the average operating ratio going from 88.5 to 94.2, the proportion of ticket receipts remaining after covering costs of operating the service show an indicated decrease from nearly 11-½ percent in 1970 to 5-¾ percent in 1980.

OPERATING REVENUES
Class I Carriers
Millions of Dollars

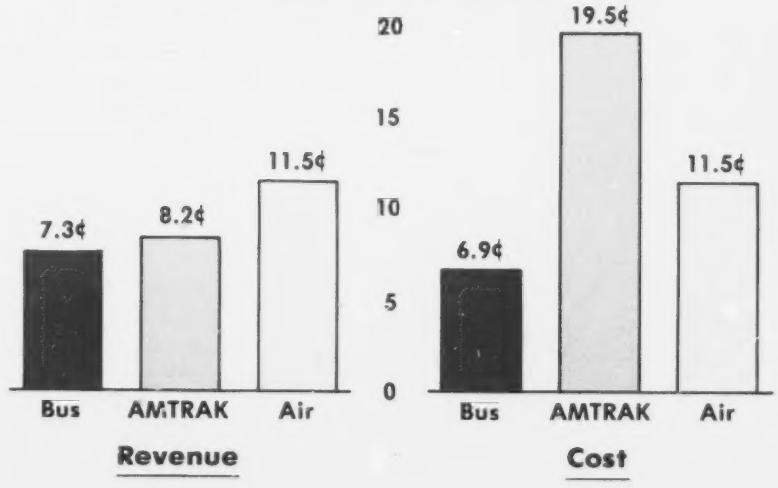
	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
Total	721.7	758.4	775.3	814.6	932.6	954.7	997.0	932.4	982.7	1,036.7	1,205.2	1,393.9
Passenger revenue												
Intercity regular route	510.9	540.1	540.3	562.4	647.9	641.9	646.2	619.0	649.9	670.8	795.4	943.4
Local regular route	13.3	12.6	11.7	13.8	14.0	11.7	12.0	11.2	11.1	7.9	8.8	10.0
Charter and Special Service	79.9	85.5	95.2	104.2	127.2	146.6	162.8	135.1	143.8	160.1	181.8	204.0
Package express revenue	102.2	104.1	110.1	115.2	121.9	131.2	151.9	146.3	154.1	173.0	190.2	203.8
Mail revenue	2.4	2.7	2.8	2.0	2.8	2.8	2.8	0.4	0.2	0.2	0.2	0.2
Station revenue	8.7	8.6	8.8	9.4	10.0	9.6	9.6	9.3	11.1	12.3	14.1	15.2
Other Operating revenue	4.3	4.8	6.4	7.6	8.8	10.9	11.7	11.1	12.5	12.4[1]	14.7[1]	17.3[1]

For footnotes and source, see pages 22 and 23.

Passenger loads for buses operating in regularly scheduled intercity services of the Class I carriers in 1980 averaged some 19.9 persons — down slightly from 1979 but only modestly greater than during most years of the 1970-1980 decade. With average loads in this range continuing relatively unchanged at 44 to 47 percent of average bus seating capacity, it has been only the increases in average fares, greater package express receipts, and, for many carriers, rising volume of charter and tour services which kept gross revenues from falling behind expenses on a broad scale.

Revenues from scheduled intercity passenger transportation averaged $1.45 per bus mile operated in such service in 1980, or $1.77 if package express receipts are included (services often considered together since bus package express generally moves on buses in scheduled service). Charter and special tour services derived revenues averaging $1.68 cents per bus mile operated in such services. Other services provide smaller amounts of revenue; services in stations and terminals brought in $15.2 million in 1980, and other miscellaneous services $17.5 million.

REVENUE AND INDICATED COST
Cents per Passenger Mile
Bus and Competing Common Carrier Intercity Modes—1980



REVENUE AND OPERATING AVERAGES —CLASS I CARRIERS

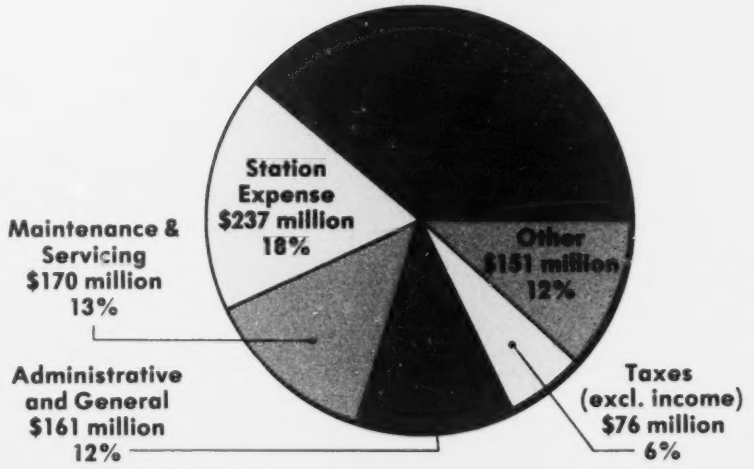
	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
REVENUES PER BUS MILE (cents)												
All services—average	82.9	88.6	91.7	95.8	105.3	112.5	119.0	120.4	128.3	140.2	158.0	179.1
Regular-route intercity service[1]												
Passenger revenue	68.8	74.3	76.5	79.9	89.4	93.2	96.1	97.4	103.1	111.0	126.8	145.1
Package express revenue	13.8	14.3	15.6	16.4	16.8	19.0	22.6	23.0	24.4	28.6	30.3	31.4
Charter and special service[1]	72.1	76.1	77.3	81.0	90.1	101.2	107.3	105.3	114.2	124.4	140.7	167.8
REVENUE in regular-route intercity passenger service												
Per passenger-mile (cents)	3.60	3.83	3.98	4.05	4.42	4.85	5.14	5.16	5.18	5.62	6.21	7.28
Per passenger (dollars)	3.81	4.19	4.25	4.73	5.13	5.46	5.76	6.09	6.48	6.90	7.71	8.98
PERCENT OF TOTAL OPERATING REVENUES												
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Passenger revenue												
intercity regular route	70.8	71.2	69.7	69.0	69.5	67.2	64.8	66.4	66.2	64.8	66.0	67.7
Local regular route	1.8	1.7	1.5	1.7	1.5	1.2	1.2	1.2	1.1	0.8	0.7	0.7
Charter and special service	11.1	11.3	12.3	12.8	13.6	15.4	16.3	14.5	14.6	15.3	15.1	14.6
Package express revenue	14.2	13.7	14.2	14.1	13.1	13.8	15.2	15.7	15.7	16.7	15.8	14.6
Station revenue	1.2	1.1	1.1	1.2	1.1	1.0	1.0	1.0	1.1	1.2	1.2	1.1
Other revenue	0.9	1.0	1.2	1.2	1.2	1.4	1.5	1.2	1.3	1.2	1.2	1.3
PASSENGER MILES												
Per bus mile (average load)[2]	19.1	19.4	19.2	19.7	20.2	19.2	18.7	18.9	19.9	19.7	20.4	19.9
Per passenger (average trip)[2]	106	109	107	117	116	113	112	118	127	123	124	123

For footnotes and source, see pages 22 and 23.

Expenses

The largest proportion of bus operating expenses typically falls into the "transportation" category. The $508 million of such expenses in 1980, 39 percent of total, included driver wages ($324 million), fuel costs ($113 million, exclusive of some $11 million in taxes), tolls paid for the use of highway facilities ($6.4 million), and expenses of drivers for meals and lodging when away from home (estimated at nearly $15 million). Cost for fuel has been increasing most rapidly, going from $38 million in 1974 (exclusive of taxes), to $75 million in 1979 and, as already noted, $113 million in 1980. Expenses for stations and terminals totaled $237 million, or 18 percent of gross operating expenses; included, in addition to costs for operation of company-owned facilities, was $95 million paid to commission agents who sell bus tickets and provide bus station facilities and services in thousands of smaller communities throughout the country. Maintenance and servicing, primarily of buses, took $170 million (13 percent of the total) and administrative and

Distribution of Expense Dollar By Department Class I Carriers - 1980


Station Expense $237 million 18%
Other $151 million 12%
Maintenance & Servicing $170 million 13%
Administrative and General $161 million 12%
Taxes (excl. income) $76 million 6%

OPERATING EXPENSES
Class I Carriers
Millions of Dollars

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
Total	639.0	664.4	689.6	738.0	858.7	893.2	952.1	890.5	937.7	998.3	1,147.0	1,312.8
Operating and maintenance												
Total	544.5	568.1	592.2	629.8	737.6	774.3	830.0	779.5	826.3	875.9	1,015.0	1168.8
Equipment maintenance and garage	97.8	101.5	101.1	104.3	118.0	123.7	129.8	119.8	124.4	129.2	148.8	170.4
Transportation	226.9	236.1	244.0	260.7	316.3	329.7	349.7	327.0	348.1	358.1	424.6	507.6
Station	110.0	115.2	119.2	127.6	145.7	149.6	163.6	157.8	164.2	175.5	204.6	237.3
Transportation solicitation and advertising	21.0	21.7	22.4	24.3	28.3	32.5	36.8	35.1	36.3	39.0	42.2	45.4
Insurance and safety	22.8	23.3	25.8	29.7	35.7	35.6	37.6	34.4	41.2	46.8	50.3	47.5
Administrative and general	66.0	70.3	79.7	83.2	93.6	103.2	112.5	105.4	114.1	127.3	144.5	160.6
Depreciation and amortization	33.3	32.6	29.6	32.5	38.3	38.6	37.0	33.5	30.4	38.8	43.9	48.6
Operating taxes and licenses[1]	49.1	51.5	54.0	50.9	63.3	64.3	67.3	63.1	66.0	68.1	69.3	76.4
Operating rents, net	12.1	12.2	13.8	16.8	19.5	16.0	17.8	14.4	15.0	15.5	18.8	19.0

For footnotes and source, see pages 22 and 23.

general expense $161 million (including nearly $89 million for costs for pensions, health insurance, and other employee welfare programs). Costs for operating taxes and licenses, exclusive of income taxes, totaled $76 million (or $83 million if highway tolls are included). Social security taxes represent the largest and most rapidly growing element of tax cost — nearly quadrupled over the 1970-80 decade to some $43-½ million in 1980. Some $24 million was paid in 1980 in highway user levies despite relief late in 1978 from most of the federal automotive taxes in recognition of the fuel efficiency of bus transportation.

Direct labor cost, as measured by payrolls, accounted for 45-½ percent of total operating expenses in 1980, or $598 million. Fringe labor costs added $159 million, or 27 percent, to the total. Included in such fringes are employer shares of social security taxes, employee welfare costs, workmen's compensation and employee expenses, primarily for drivers' meals and lodging when away from home.

Distribution of Expense Dollar
Labor and Nonlabor
Class I Carriers - 1980

EXPENSE AND LABOR COST AVERAGES
Bus Miles Per Employee—Class I Carriers

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
AVERAGE PER BUS-MILE (cents)												
Total operating expenses	73.4	77.6	81.5	86.8	97.0	105.2	113.6	115.0	122.1	135.0	150.4	168.6
Payrolls	36.4	39.0	40.6	42.8	46.8	50.8	54.8	55.8	58.9	63.6	69.5	76.8
Fringe labor costs	6.4	7.1	8.5	9.2	10.3	11.8	13.2	13.6	14.9	17.3	18.9	20.4
Nonlabor expenses	30.6	31.5	32.4	34.8	39.9	42.6	45.6	45.6	48.3	54.1	62.0	71.4
PERCENT OF TOTAL OPERATING EXPENSES												
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Payrolls	49.5	50.2	49.8	49.3	48.3	48.3	48.3	48.6	48.2	47.1	46.2	45.6
Fringe labor costs	8.8	9.2	10.4	10.6	10.6	11.2	11.6	11.8	12.2	12.8	12.5	12.1
Nonlabor expenses	41.7	40.6	39.8	40.1	41.1	40.5	40.1	39.6	39.6	40.1	41.3	42.3
OPERATING EXPENSES AS PERCENT OF REVENUES[1]	88.5	87.6	88.9	90.6	92.1	93.6	95.5	95.5	95.4	96.3	95.2	94.2
BUS MILES PER EMPLOYEE												
All employees	25,330	24,650	24,770	25,130	24,860	24,160	24,840	24,960	25,900	25,350	25,450	24,960
Drivers	54,060	52,760	52,660	54,490	51,940	49,670	51,380	52,520	53,200	52,580	53,670	52,740

For footnotes and source, see pages 22 and 23.

TAXES—CLASS I CARRIERS (Millions of Dollars)

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
TOTAL	96.2	101.0	99.3	99.0	111.6	104.4	97.0	91.2	93.8	91.6	91.2	108.1
STATE AND LOCAL HIGHWAY-USER TAXES												
Total	22.9	23.0	22.8	22.8	23.6	23.1	22.6	21.3	21.5	21.2	22.4	24.1
Motor fuel and oil	9.9	9.8	10.2	10.4	10.8	10.3	10.1	9.5	9.6	9.3	9.8	10.7
Licenses and registration fees	7.2	7.5	7.1	6.9	6.7	6.6	6.3	5.9	6.1	6.4	6.7	7.0
Tolls	5.8	5.7	5.5	5.5	6.1	6.2	6.2	5.9	5.8	5.5	5.9	6.4
FEDERAL AUTO TAXES												
Total	12.8	12.7	13.0	12.8	12.0	13.8	13.7	12.7	11.0	8.3	0.9	1.0
Motor fuel and oil	5.7	5.7	5.5	5.6	5.1	5.2	5.2	4.9	4.9	4.5	0	0
Licenses and registration	0.9	0.9	0.9	0.9	0.9	0.9	0.9	0.8	0.8	0.9	0.9	1.0
Excise taxes	6.2	6.1	6.6	6.3	6.0	7.7	7.6	7.0	5.3	2.9	0	0
SOCIAL SECURITY TAXES												
Total	13.5	15.0	16.9	21.2	24.8	26.0	29.4	27.2	29.3	32.4	37.9	43.4
Federal	12.5	13.9	15.3	19.2	22.5	23.8	25.4	23.7	25.3	27.7	NA	NA
State	1.0	1.1	1.6	2.0	2.3	2.2	4.0	3.5	4.0	4.7	NA	NA
OTHER OPERATING TAXES												
Total	11.1	11.8	12.5	13.0	14.0	14.3	14.4	14.1	14.4	13.7	14.0	14.3
Real & personal property	7.2	7.8	8.1	8.3	8.0	8.3	8.4	8.2	8.7	8.4	NA	NA
Other state	3.4	3.5	3.9	4.2	5.5	5.8	5.8	5.7	5.5	5.1	NA	NA
Other federal	0.5	0.5	0.5	0.5	0.5	0.2	0.2	0.2	0.2	0.2	NA	NA
INCOME TAXES												
Total	35.9	38.5	34.1	29.2	37.2	27.2	16.9	15.9	17.6	16.0	16.0	25.3
Continuing operations[1]	NA	NA	NA	NA	31.7	NA	NA	9.7	11.7	12.6	11.6	10.0
Provision for deferred taxes	NA	NA	NA	NA	5.5	NA	NA	6.2	5.9	3.4	4.4	15.3

For footnotes and source, see pages 22 and 23.

MOTOR FUEL CONSUMPTION, EFFICIENCY, AND COST
Class I Carriers—1974-1980

	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
Consumption—millions of gallons	140.7	135.1	134.8	125.0	126.4	121.9	127.4	132.2
Efficiency								
Bus miles per gallon (all service)	6.3	6.3	6.2	6.2	6.1	6.1	6.0	5.9
Passenger miles per gallon (regular-route intercity service)	127[1]	121[1]	116[1]	117[1]	121[1]	120[1]	122[1]	117[1]
Cost								
Total								
Millions of dollars	54.3	57.2	60.8	57.0	62.6	61.9	84.5	123.5
Cents per gallon	38.6	42.3	45.1	45.6	49.5	50.8	66.3	93.4
Cents per bus mile	6.1	6.7	7.2	7.4	8.2	8.4	11.1	15.9
Without taxes								
Millions of dollars	38.4	41.8	45.5	42.4	48.0	48.1	74.7	112.8
Cents per gallon	27.3	30.9	33.7	33.9	38.0	39.5	58.6	85.3
Cents per bus mile	4.3	4.9	5.4	5.5	6.3	6.5	9.8	14.5
Taxes								
Millions of dollars	15.9	15.4	15.3	14.6	14.6	13.8	9.8	10.7
Cents per gallon	11.3	11.4	11.4	11.7	11.6	11.3	7.7	8.1
Cents per bus mile	1.8	1.8	1.8	1.9	1.9	1.9	1.3	1.4

For footnotes and source, see pages 22 and 23.

PASSENGER TRAFFIC AND VEHICLE-MILES (Millions)
Class I Carriers

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
REVENUE PASSENGER-MILES TRAVELED IN REGULAR-ROUTE INTERCITY SERVICE	14,173	14,104	13,576	13,898	14,667	13,240	12,560	11,990	12,560	11,960	12,800	13,050
PASSENGERS CARRIED												
Total Number	174	167	164	155	168.7	152.2	145.9	127.7	125.1	124.8	133.0	134.2
Regular-route intercity service	134	129	127	119	126.3	117.6	112.1	101.7	98.9	97.2	103.1	105.0
Local and suburban service	21	19	16	17	17.0	13.7	13.5	12.7	11.8	8.2	8.7	8.9
Charter and special service	19	19	21	19	25.4	20.9	20.3	13.3	14.4	19.4	21.2	20.3
VEHICLE-MILES OPERATED												
Total	870.9	856.0	845.8	850.0	885.6	848.9	838.0	774.6	766.2	740.0	762.9	778.5
Regular-route intercity service	742.2	726.7	706.7	703.8	725.1	689.0	672.4	635.4	629.6	605.0	627.1	650.0
Local and suburban service	16.9	16.2	15.2	16.9	16.7	13.0	11.9	10.8	10.6	10.9	6.5	6.8
Charter and special service	110.8	112.3	123.2	128.6	141.2	144.9	151.7	128.3	125.9	124.0	129.2	121.6
Non-Passenger service	1.0	0.8	0.7	0.7	2.6	2.0	2.0	0.1	0.1	0.1	0.1	0.1

For footnotes and source, see pages 22 and 23.

EMPLOYEES AND THEIR COMPENSATION—CLASS I CARRIERS

	1970	1971	1972	1973	1974	1975	1976	1976(A)*	1977	1978	1979	1980**
ALL EMPLOYEES												
Average Number	34,383	34,731	34,147	33,829	35,621	35,140	33,740	31,030	29,700	29,194	29,978	31,190
Payroll (millions)	$316.7	$333.9	$343.2	$363.5	$414.6	$431.3	$459.7	$432.5	$451.9	$470.9	$529.8	$598.0
Fringe labor costs (millions)[1]	56.1	61.1	72.0	78.7	91.3	100.0	110.5	105.3	114.6	127.9	143.8	158.8
Average annual earnings[2]	9,211	9,614	10,051	10,747	11,640	12,270	13,620	13,940	15,215	16,131	17,672	19,170
DRIVERS												
Average number	16,111	16,225	16,062	15,598	17,050	17,090	16,310	14,750	14,400	14,073	14,215	14,760
Payroll (millions)	$173.9	$183.0	$188.8	$199.8	$230.9	$238.6	$252.7	$237.2	$250.1	$255.5	$288.2	$324.3
Average annual earnings[2]	10,794	11,280	11,756	12,810	13,540	13,960	15,490	16,080	17,368	18,158	20,274	21,970

For footnotes and source, see pages 22 and 23.

ACCIDENT DEATH RATES IN PASSENGER TRANSPORTATION[1]

Passenger Fatalities Per 100,000,000 Passenger Miles[2]

Domestic Operations

	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980	3 YEAR AVERAGE 1978-80
Intercity buses	0.01	0.09	0.17	0.16	0.06	0.02	0.01	0.04	0.01	0.02	0.13	0.06
Automobiles	2.1	1.9	1.9	1.7	1.5	1.4	1.3	1.3	1.3	1.3	1.3	1.3
Railroads	0.09	0.23	0.53	0.07	0.07	0.08	0.05	0.04	0.13	0.05	0.04	0.07
Airlines	0.00	0.16	0.13	0.10	0.12	0.09	0.003	0.04	0.01	0.12	0.01	0.04

[1]These qualifications apply: Buses include only intercity operations (regular route and charter) of all Class I bus carriers reporting to the ICC and the Bureau of Motor Carrier Safety of the Federal Highway Administration, automobiles include taxis, railroads include only "railroad passenger trains," and airlines include only scheduled air transport planes.

[2]Excluding drivers or operating crews, except automobiles.

Source: ACCIDENT FACTS, National Safety Council, Chicago, except rates for intercity buses, which are derived by ABA from ICC and Bureau of Motor Carrier Safety data.

For footnotes and source, see pages 22 and 23.

Footnotes and Sources

Footnotes Applicable Generally — The following footnotes are applicable through the booklet for items or series indentified by the asterisk symbols: * or ** or by NA.

* Representing only carriers classified as Class I under test effective January 1, 1977; figures from ABA tabulation.

** Preliminary.

NA — Information not available.

Sources in General — Except as otherwise noted in page references below and on the following page, statistical information appearing in *Bus Facts* is derived from reports of carriers to the Interstate Commerce Commission (ICC), primarily from annual (MP-1) and quarterly (QPA) reports of the larger, Class I companies in interstate service, as well as ICC summaries of such carrier reports. Specific operating and financial data on the bus industry is in general available, on a comprehensive basis over the years, only for the Class I companies.

Data for smaller companies in interstate service and hence reporting to the ICC (but not in the Class I category) are estimated on the basis of partial review of brief annual (MP-2) reports of such companies to the ICC and on trends for carriers in the Class I group most comparable in terms of size and operating characteristics.

Information for carriers in intrastate service is directly available only to the extent reported in usable form in Censuses of Transportation, conducted at approximately five-year intervals between 1963 and 1977. Such census data are supplemented with estimates by ABA, using information from all available sources, including data from comparable Class II and III carriers reporting to the Commission and trend data for smaller Class I interstate carriers.

Page iii — *Footnotes:*

[1] Including commutation (Class I railroads only for passenger count).

[2] Intercity service as reflected in AMTRAK timetables.

[3] Exclusive of Alaska and Hawaii.

Sources:

Bus — ABA estimates; Rail — *Yearbook of Railroad Facts*, Association of American Railroads and AMTRAK — *National Train Timetables;* Airlines — Civil Aeronautics Board reports.

Page 3 — *Footnotes:*

[1] Includes duplication between carriers.

[2] Operating companies only.

[3] Operating expenses divided by operating revenues.

[4] Excludes income taxes.

Sources:

Compiled by ABA from Interstate Commerce Commission data (including published materials and reports filed by individual carriers), supplemented by estimates to cover unavailable segments and by the Motor Carrier Survey in the Censuses of Transportation (1963-1977).

Page 5 — *Footnotes:*

[1] Statement No. 750, No. A-750, or No. Q-750 of ICC or tabulation of carrier reports; including duplications.

[2] Including passenger miles in regular-route intercity service and, as estimated, for charter and special service.

[3] Operating expenses divided by operating revenues.

[4] Excluding income taxes but including federal excie taxes on purchases of new buses and on parts and accessories (through 1977) and tolls for highways, bridges, etc.

[5] "Net carrier operating property," representing depreciated value of buses, land, buildings and equipment required for bus operations.

Page 7 — *Footnotes:*

[1] In terms of bus miles per gallon, the estimated averages are: 1972 - 6.0, 1973 - 6.0, 1974 - 6.2, 1975 - 6.2, 1976 - 6.1, 1977 - 6.0, 1978 - 6.0,

1979 - 6.0, and 1980 - 5.9.

[2] Including diesel-fuel equivalent of electric-power used; ignoring all consumption of electric power, passenger miles per gallon averaged 51 in 1977, 47 in 1978, 62 in 1979, and 60 in 1980.

Sources:
Intercity Buses - Estimated by American Bus Association on basis of carrier reports to Interstate Commerce Commission, unpublished carrier data, and intra-industry relationships.
Amtrak - R-1 Reports to ICC except diesel equivalent for electric power, which is estimated from reported electric power usage on basis of 12.92 kilowatt hours per gallon.
Airlines - 1972-1974: CAB Report to the Congress as required in section 382 (a) (2) of the Energy Policy and Conservation Act of 1975; 1975-1980: **Air Carrier Traffic Statistics** for passenger miles and unpublished CAB data and **Fuel Cost and Consumption** for fuel consumption.
Automobile - Table VM-1 of Federal Highway Administration, Environmental Protection Agency figures, and estimated relationships. Average load is estimated at 2.5 passengers, an estimate based on data reported by the Federal Highway Administration in its Nationwide Personal Transporatation Study (1972) for automobile trips of more than 20 miles. Average vehicle miles per gallon for intercity travel are estimated as follows: 1972 - 16.2, 1973 - 15.8, 1974 - 16.2, 1975 - 16.3, 1976 - 16.5, 1977 - 16.6, 1978 - 16.6, and 1979 - 16.9, based on overall fuel consumption figures (per vehicle mile) reported by the Federal Highway Administration on its Table VM-1, allocated to local and intercity travel according to the comparative patterns for fuel efficiency for new automobiles reported by the Environmental Protection Agency and by the Department of Energy. Energy intensities (BTU's per passenger mile) estimated from energy efficiencies (passenger miles per gallon) at conversion factors of 138, 700 BTU's per gallon of diesel fuel, 125,000 for automotive gasoline, and 135,000 for aviation jet fuel.

Page 8 — *Footnotes:*

[1] Income from continuing operations (1976-1980); ordinary income (1967-1975); not consolidated for affiliated carrier groups.

[2] Operating expenses divided by operating revenues.

Page 10 — *Footnote:*

[1] Including "transfers from government authorities" totaling $5.3 million in 1978, $6.6 million in 1979, and $8.6 million in 1980

Page 12 — *Footnotes:*

[1] Per mile operated in such service.

[2] Regular-route intercity service.

Page 14 — *Footnote:*

[1] Excluding tolls, federal excise taxes on purchase of new buses and parts and accessories, and income taxes.

Page 16 — *Footnote:*

[1] Operating ratio.

Page 17 — *Footnote:*

[1] Income taxes on ordinary income prior to 1976.

Page 18 — *Footnote:*

[1] Figured at average loads for regular-route intercity service (20.2 for 1974, 19.2 for 1975, 18.7 for 1976, 19.9 for 1977, 19.7 for 1978, 20.4 for 1979 and 19.9 for 1980); loads for charter and special services are typically much higher, making average passenger miles per gallon shown here understatements of actual experience for overall industy operations.

Sources:
Except as indicated, carrier reports to Interstate Commerce Commission on Forms QPA and MP-1 and Commission summaries in *Transport Statistics in the United States*.

Page 20 — *Footnotes:*

[1] Including employee welfare benefits (pensions, health insurance, etc.), employer shares of social security taxes, workmen's compensation, and employee expenses (primarily meals and lodging for drivers away from home).

[2] Payroll divided by number of employees.

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